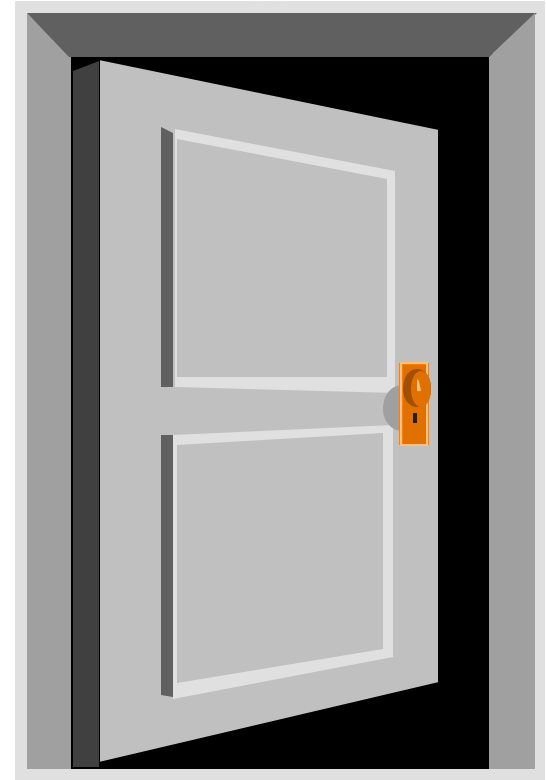


# School Portal Initiative

## What Are Portals?

- A doorway, an entrance, or a gate, especially one that is large and imposing.
- An entrance or a means of entrance: the local library, a portal of knowledge.
- A gateway to information and its location – Yahoo, Alta Vista, Infoseek, and EIPs.

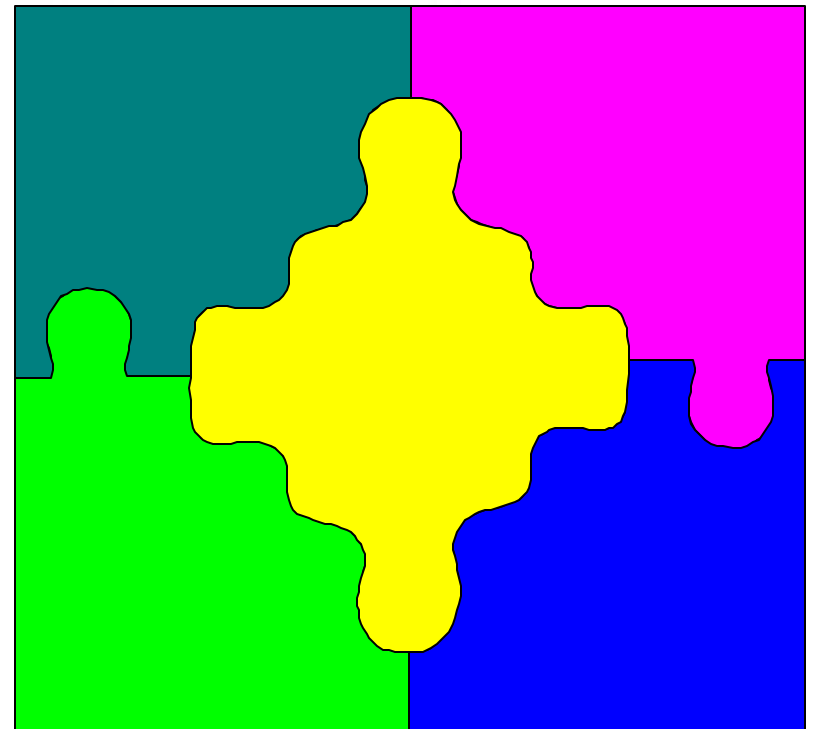


## **What Should a Portal Do?**

- Improve access to information
- Reduce the amount of time it takes to act on information
- Facilitate on-line user interaction and collaboration
- Aggregate data: Smart Summaries
- Provide interactive (bi-directional) workflow
- Allow for Internal and External Access - Meta-Searching

## Design Considerations

- Who are your end users?
- What views of information will users need?
- What data sources will users need?
- What aggregate views will users need?
- What search capability will users need?



## Data Source Perspective

- How does ED define the XML structure?
- What views of information do users need?
- What data sources do users will users need to update?
- How does information in the Portal relate to information in other sources?
- Can the external application support real-time access?
- Can this external application be updated through the portal?

SFA Schools Portal

File Edit View Go Communicator Help

Bookmarks Go to: http://schools.sfa.gov

Schools Portal  
Welcome, Ann Marie! 1:42 PM - 12/14/99

Advertisement  
**DELL** announces  
10% discount for students!

Records Products Services Systems Forms/Pubs Training DL News Help

Search SFA for Forms and Publications containing Search

My Shortcuts

- Technical Resource Library
- Compile FISAP
- Direct Loan Bulletins
- NASFAA

My Views

Functions and Views	View
Loan Origination	
Loan Counseling	
Student Records	
Financial Aid System	
Bursar/Business Office	

SFA - We're Here To Help

- Download SFA Coach
- Register with SFA University
- Chat with SFA
- Send SFA E-Mail

Today's Headlines

- SFA Announces Eliminates Mid-year FAT
- Entrance Counseling Results Sent to Schools Electronically
- DL System Live for 2000-2001

SSN Verification

EFC Verification

"We help put America through school."

SFA Schools Portal, Version 0.0

Document: Done



## ✓ Direct Loan Conference, 3/1/00

- Schools
- Department of ED
- Third Party Vendors
- Contractors

# Focus Group: Prioritized Functionalities

Assumptions: powerful search engine and query tools

- ① Real time student inquiry
- ② Aggregated Data
- ③ Management Status
- ④ Ability to integrate school data with ED data
- ⑤ Task management and ED deadline info.
- ⑥ Benchmark information
  - ✓ Cross-school/ school type information



# Focus Group: Additional Functionalities

- ✓ GAPS
- ✓ 732a
- ✓ Common data set
- ✓ Ability to customize desktop

## ✓ Main Categories Defined

- Information
  - including links to school related sites and DCL, Regulation type information
- Task Management and Reporting
  - Including reminders of when items are due to ED and aggregate data for reports
- Customer Service
  - Including student-level information

# Focus Group: Information

- Daily news from Academ Today, NASFAA, Journal Transcript and others
- Links to NACUBO, CommonLine and others
- User-defined Links
- SFATech with personalized profile
- Dear Colleague Letters
- Cohort Default Rate Information

# Focus Group: Task Management & Rpting

- Aggregate data for loan volumes, disbursements, Pell, etc.
- GAPS access
- Benchmark to other campuses or institutions
  - e.g.: average PLUS debt as compared to other similar schools
- Deadlines from ED (PPA, FISAP, etc)
- ISIR volume
- Audits and Program Review results
- Links to accrediting agencies for expirations, etc.
- Ability to query high instances of comment codes, etc.

# Focus Group: Task Management & Rpting

- SSCR error reports
- Overpayment input timelines
- Ability to assign overpayments to DCS
- Default Calculator by actual cohort
- Information on delinquent students “real-time”
- Built-in school and local management tools
- Worksheet data used to arrive at funding authorities
- 732 report access
- IPEDS and historical data with access to survey tools
- Common data sets/ elements
- Institution’s profile with ED

# Focus Group: Customer Service

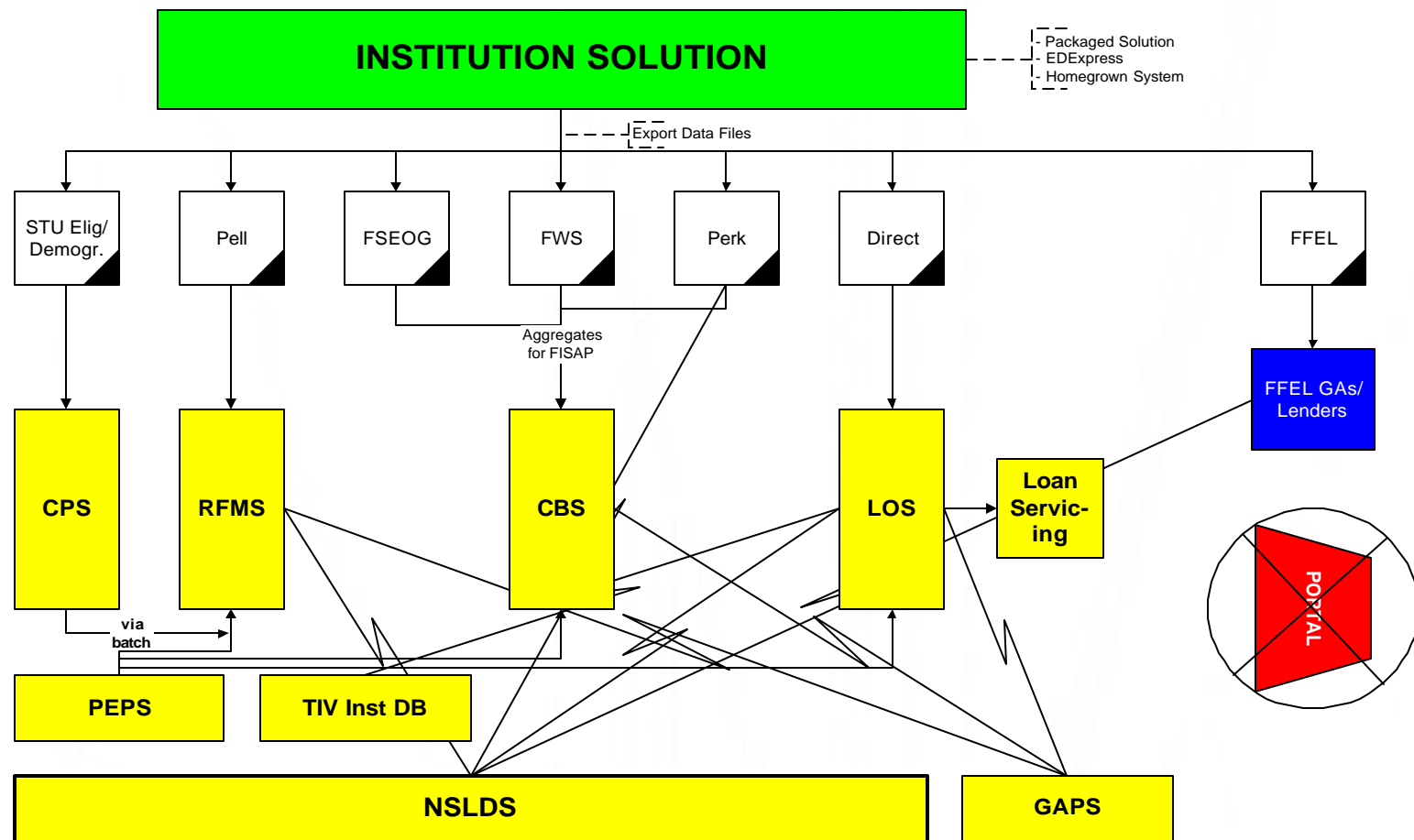
- On-line, real-time student inquiry
  - NSLDS type data, but from the source, similar to VSAM or Highway 1
- Student payment data
- Exit counseling including all loan data and no PIN required to just take the test
- Student information across institutions for students enrolled at multiple institutions



# Architecture Supporting Portals

- Evolutionary Process
- “Best Available” data during initial years
- Move to real-time data via link to operational systems as they are reengineered

# Current Systems without Middleware

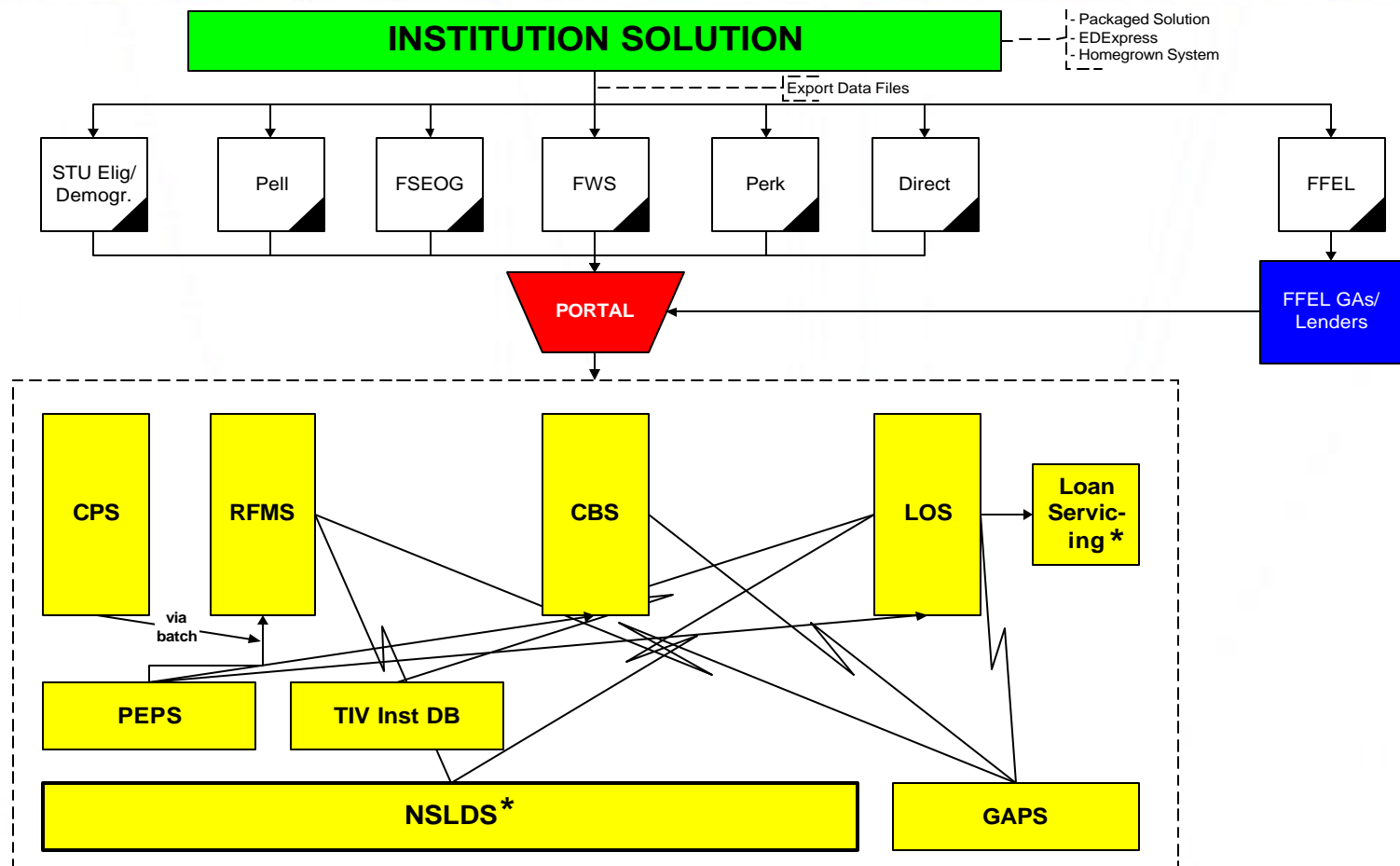


- varying business rules
- four distinct processes at schools and ED
- lost data/ data "chasing" (students, schools, ED)
- moving data via batch as opposed to data sharing
- redundant data and conflicting data

- no common edits
- few systems share data

**- no "whole picture" for students, schools, ED**

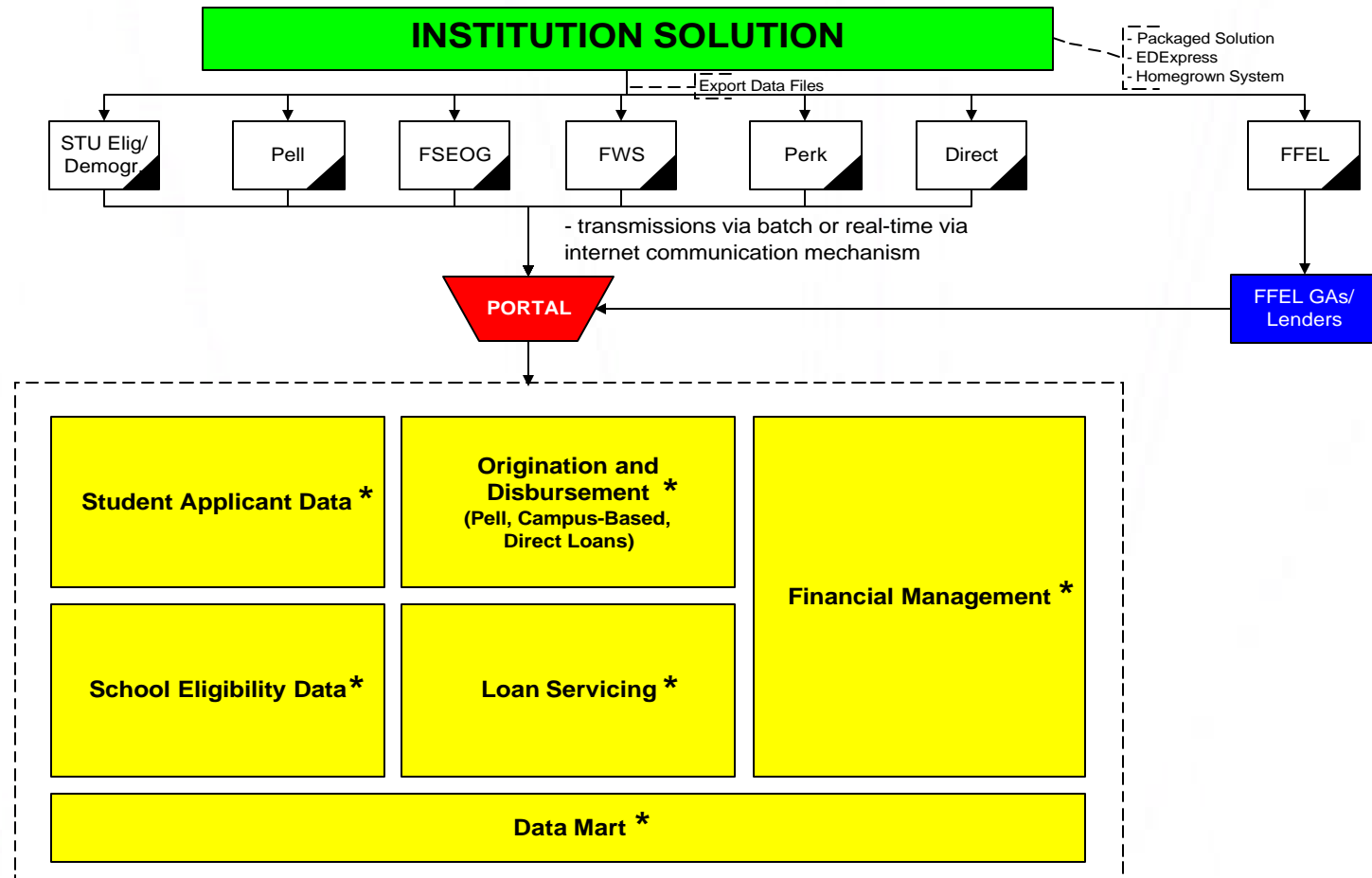
# Current Systems with Middleware



- varying business rules
- four distinct processes at schools and ED
- data 'fetching' as opposed to data sharing
- redundant data and conflicting data
- no common edits
- will not effectively support data warehouse

- "whole picture" for students, schools, ED
  - systems providing data to portal noted by "\*\*\*"
  - not real-time
  - data integrity issues

# Reengineered Systems with Middleware



- data stored once, aligned with business practices
- real-time data sharing without data transfer
- real-time, continuous tracking of data
- real-time, continuous validity checking
- common edits across program when necessary

- portal "points" users to best source
- one process for getting funds for schools
- **real-time, accurate "whole picture" for students, schools, ED/ SFA**
- **systems that will provide data to portal noted with "\*"**

## School Portal Preliminary Plans

<b>Focus Groups including Institutions, Third Party Servicers, Vendors</b>	<b>March – June 2000</b>
<b>High Level Portal Design Prototype</b>	<b>May 2000</b>
<b>Reengineered IFAP</b>	<b>June 2000</b>
<b>Common Origination and Disbursement</b>	<b>2002-2003</b>